

## Banner CSM-Affiliate CWID & Custom Role Assignment Procedure

[This document will be updated as new custom roles are added.]

The person for whom you are creating a Banner person entry should present you with either a **signed and authorized** (a) Pre-Employment Authorization form or (b) Banner CSM-Affiliate/Custom Role Authorization form.

The Pre-Employment Authorization form is at:

<http://www.is.mines.edu/hr/Forms/Pre-Employment%20Form.doc>

The Custom Role Authorization form is at:

<http://help.mines.edu/hr/gettingstarted/customroles/CustomRoleAuthorization.pdf>

### Who Can Apply and Authorize Custom Roles:

Custom Role Name	Who is authorized to apply the role (managing office listed first)	Required Authorization
AC&N	AC&N	AC&N
AlumniAssociation	AC&N, HR, BlasterCard Office, IS	Alumni Association
ARAMARK	BlasterCard Office, HR, AC&N, IS	Aramark
Bookstore Employee	BlasterCard Office, HR, AC&N, IS	Barnes and Noble
BOT (Board of Trustees Member)	Academic Affairs, HR, AC&N, BlasterCard Office, IS	President's Office
CSMAssociate	AC&N	Various
EmpCWID (Employee CWID Lookup)	HR	HR
Emeritus Faculty	Academic Affairs, HR, AC&N	Academic Affairs
Foundation Employee	AC&N, HR, BlasterCard Office, IS	Foundation Office
InterLink Student/Faculty	AC&N, HR, BlasterCard Office	Interlink Office
OIA (Office of Institutional Advancement)	AC&N, HR, BlasterCard Office, IS	OIA Office
Pre-Employment	HR, Academic Affairs, AC&N, IS	Hiring Department
ROTC Student/Faculty	AC&N, HR, BlasterCard Office, IS	ROTC Office
Other Student (non-Mines)	AC&N, HR, BlasterCard Office, IS	Various Offices

### The main steps to this process are:

- 1) Login to INB/PROD (or INB/TEMP).
- 2) Fast Search using **SOAIDEN**.
- 3) Common Matching Search using **GOAMTCH**.
- 4) New Person Entry (if person not found) using **GOAMTCH**.
- 5) Apply Custom Role(s) using **GZACROL**.
- 6) Route paper form to appropriate office or shredder.

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**1) Login to INB/PROD:** <https://banner.mines.edu/>

or to INB/TEMP: <https://bannertest.mines.edu/forms90/f90servlet?config=temp>

**2) Fast Search** to see if the person already has a Banner entry:

Use the **SOAIDEN** form. (Enter **SOAIDEN** into the "Go To..." dialog box, press Return):

- a. **Last Name:** Enter the first 3 characters and a % sign.
- b. **First Name:** Enter the first 2 characters and a % sign.
- c. **Middle Name:** (optional), leave blank if you don't know it.
- d. Press **F8** to execute the query.


**NOTE:** % (percent sign) is the wildcard character; \_ (underscore character) is the wildcard character for a single character.

- If **too many results** are returned, try iteratively adding additional characters before the % signs and search again by pressing **F8**.
- To **clear the form** for another search, press **F7**.

- To **examine details** of an individual, select the entry, select Options > Search and Display More Detail [SOAIDNS], press **F8**.
- If a **match is found** (only if the Change Indicator field is blank) double click the ID to select, then click on the **X** (upper right) to close the form and proceed to Step 5 to **apply appropriate Custom Roles**.
- If you don't get any potential matches after your initial query, or after performing iterative searching, you are reasonably sure the person does not already have a Banner record, then move on to Step 3 for the Common Matching Search.

### 3) Common Matching Search: ...to be used if a **match was not found** in Step 2.

Use the **GOAMTCH** form (Enter **GOAMTCH** into to the "Go To..." dialog box, press Return):


- Click on **Generate ID** button ( (upper left to the right of the **ID** box).
- Click on the dropdown arrow to the right of **Matching Source**.
- Select **CN\_ENTRY** and then **OK**.

**NOTE:** The following instructions are written **specifically for use with the CN\_ENTRY common matching rules**. If you are using a different set of common matching rules, you need to know some details about how your rules are configured (eg, how many characters are being used to qualify as a match). The number of characters suggested below match with the rules used in CN\_ENTRY.



- Go to the Next Block (**Data Entry**):
  - Press **ctrl+page-down** [or select the **Next Block** button () or select **Block > Next** (from the menu bar)].

**NOTE:** % (percent sign) is **NOT** a wildcard character in GOAMTCH. In GOAMTCH, do **NOT** use:  
 % (percent), # (pound), " (double quote), \* (asterisk), or \$ (dollar sign).  
 Use a ~ (tilde) only in a URL or Homepage field.  
 Use & (ampersand) only when part of a formal name (eg, Baltimore & Ohio Railroad).

The CSM General Person Data Entry Standards are available at:  
<http://www.is.mines.edu/link/docs/GenPersDataEntryStandards.pdf>  
 The full CSM Data Standards Document is at:  
<http://www.is.mines.edu/link/docs/GenPersDataEntryStandards.pdf>

- Data Entry:**
  - Last Name:** (CN\_ENTRY uses only the first 3 characters to determine matches)
  - First Name:** (CN\_ENTRY uses only the first 2 characters to determine matches)
  - Do not enter the rest of the person data at this stage. If you enter too much information too early in the search process, you may wrongly eliminate potential matches.
- Click the **Duplicate Check** button (.
- Read the Match status dialog box and click **OK**.
- Review the output for a Match or Potential Matches:

**NOTE: To review a Match or Potential Match**, select the ID or Name then examine the Matching Rule Sets information and use the All Addresses, All Telephones and All E-Mails dropdown menus. Additionally, you can select **Details**, and view details of the match (assuming you have access to these forms) with GUASYST, SGASTDN, PPAIDEN, SPAIDEN or FTMVEND.

- o **If a Match is found**, review the output to determine if it is a **true match**. If it is a **true match**: click the **Select ID** button () , close GOAMTCH using the **X** and skip to Step 5 to apply Custom Role(s).
- o **If too many Potential Matches are found**, add some or all of the other data you will be entering for this person/custom role [see below in Step 4: "GOAMTCH Data Fields for Creating a New Person Entry"] and click the **Duplicate Check** button (.

- **If Potential Matches are found**, review the output to determine if a Potential Match is a true match. If a **true match is found**, double-click the ID to select it, close GOAMTCH using the **X** and skip to Step 5 to apply Custom Role(s).
- If no **true match** is found, continue to Step 4 to create a person entry via GOAMTCH.

#### 4) New Person Entry via GOAMTCH (no match found via SOAIDEN or GOAMTCH)




**NOTE:** In GOAMTCH, do **NOT** use:  
 % (percent), # (pound), “ (double quote), \* (asterisk), or \$ (dollar sign).  
 Use a ~ (tilde) only in a URL or Homepage field.  
 Use & (ampersand) only when part of a formal name (eg, Baltimore & Ohio Railroad).

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**NOTE:** Entry should use mixed case... as if you were typing an address label.

- Last Name, First Name, and Middle Name:** complete these fields.
- Other data fields:** enter data for the fields dictated by the Custom Role(s) that you will be applying for this person. (If the role is not listed below, please enter as much as possible... the idea is to enter enough so that later, a positive match or non-match can be made.)

Custom Role	Recommended GOAMTCH Data Fields for Creating a New Person Entry
<b>PreEmployment</b>	<ul style="list-style-type: none"> <li>- Name (Last, First, Middle)</li> <li>- DOB</li> <li>- SSN</li> <li>- Address (street, city, state, zip) – enter as Tax Address</li> <li>- Phone – enter as Tax Phone</li> <li>- Gender</li> <li>- Ethnicity</li> </ul>
<b>OIA, Alumni Association Employee, Foundation Employee</b>	<ul style="list-style-type: none"> <li>- Name (Last, First, Middle)</li> <li>- Office Address</li> <li>- Office Phone</li> <li>- University Email Address</li> </ul>
<b>Interlink</b>	<ul style="list-style-type: none"> <li>- Name (Last, First, Middle)</li> <li>- DOB</li> <li>- Permanent/Home Country Address and Phone – enter as Permanent Address/Phone</li> <li>- Local Address and Phone – enter as Local Mailing Address/Phone</li> <li>- Gender</li> <li>- SSN (if any)</li> </ul>

- Verify that the full entry does not trigger a Match by clicking **Duplicate Check** (.
- Verify that all records that you entered were created. If there were problems, attach a note to the Authorization form (to be returned to appropriate department) and/or notify the Responsible Office (see Step 6 for Responsible Offices).
- Click the **Create New** button (.
- Click the **Save** () icon (upper left under the File menu item).
- Close GOAMTCH by using the **X** (upper right) and proceed to Step 5 to apply Custom Role(s).

## 5) Apply Custom Role(s)

- Enter **GZACROL** in the “Go To...” dialog box and press Return.
- The newly created or found person should already be in the ID fields. (If not, enter CWID or Name).
- Press **ctrl+page-down** [or select the **Next Block** button () or select **Block > Next** (from the menu bar)] to move to view/review the person’s current roles/status.
- Select **Options** from the menu bar and then the specific Custom Role that you would like to add/modify.
- Make the needed modifications in the dialog box. [A = Active, I = Inactive; set an effective date for the status that you have set.] **See notes by Custom Role below.**
- Save by pressing the **Save** button ().

Custom Role	Notes
<b>PreEmployment</b>	<p><b>Expire Date:</b> verify that the date is beyond the expected first pay date. (Change if needed.)</p> <p><b>Home Orgn:</b> If you don’t have access to FTVORGN, see attached spread sheet for Home Orgn (Dept) code or <a href="http://help.mines.edu/gettingstarted/customroles/DepartmentSuffixCodes.pdf">http://help.mines.edu/gettingstarted/customroles/DepartmentSuffixCodes.pdf</a></p> <p><b>Note for AC&amp;N staff:</b> After creating the person entry/CWID and applying the PreEmployment role: (1) fill out and give the user a PINK AC&amp;N BlasterCard Form to be taken to the BlasterCard Office; (2) remind the person that they will still need to visit HR for HR Orientation to complete the rest of their paper work, to get paid, etc.</p>
<b>OIA, Alumni Association Employee, Foundation Employee</b>	<p><b>Job Title:</b> The Job Title is what is displayed in the Campus Directory. Type with mixed case. This field is limited to 30 characters.</p>
<b>Interlink</b>	<p><b>Effective Date &amp; Expire Date:</b> Start/end dates for the Interlink term.</p>

## 6) What to do with the printed Authorization form after you have created a Banner person entry and/or applied Custom Role(s):

Authorization Type (Role Name)	Where to send the Authorization Form (Responsible Office)
<b>Pre-Employment, EmpCWID</b>	HR Office
<b>All other Roles</b>	File in your office (keep in a secure/locked location)

**NOTE:** The authorization forms contain confidential/sensitive data: Keep it in a secured/locked location.